



DOVETAIL
C R E A T I V E

The Membership AI Playbook

**Driving Growth,
Engagement and
Efficiency**

www.dovetailcreative.co.uk

1. Fix Your Data Before You Fix Your Strategy

The Problem: Most membership organizations have patchy, inconsistent, or irrelevant data, which makes AI adoption frustrating and ineffective.

The Fix: Get serious about data hygiene and meaningful metrics.

Align your data strategy with your member strategy.



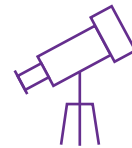
Quick Wins:

- Audit and clean CRM data: consolidate duplicates and fill missing fields
 - Define strategic metrics like Net Renewal Rate or Lifetime Member Value
 - Set data standards: who tracks what, how often, and why
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2. Enrich Your Data to See the Full Picture

The Problem: Incomplete profiles and outdated information limit insight and personalization.

The Fix: Data enrichment adds new dimensions to your existing records, giving AI (and your team) more to work with.



Quick Wins:

- Add third-party data (e.g. job titles, firmographics, interests) to member profiles
 - Capture micro-signals behaviour (clicks, content views, event no-shows)
 - Use forms and surveys to regularly update interests, goals, and pain points
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3. Spot What's Really Driving Engagement

The Problem: Engagement scores often treat all activity equally, but not all engagement creates value.

The Fix: Use AI to uncover what actually correlates with renewal, satisfaction, and advocacy



Quick Wins:

- Map behaviours that precede renewals or drop-off
 - Segment by engagement type: contributors, browsers, benefit-users, etc.
 - Use data-driven segmentation to identify underserved member groups
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4. Don't Let Rich Feedback Go to Waste

The Problem: Open-text feedback, emails, and event comments hold insight, but often get buried.

The Fix: Use AI to analyse sentiment, detect recurring issues, and surface what matters most to members.



Quick Wins:

- Uncover key themes across surveys, support tickets, and event feedback
- Correlate sentiment with actual member behaviour (e.g. churn, upgrades, etc.)
- Group feedback by persona or segment to prioritize action

5. Know What Members Will Do Before They Do It

The Problem: Member decisions (like renewal or churn) often feel sudden, but the signals are there.

The Fix: Use predictive models to forecast behaviour and guide proactive outreach.

Quick Wins:

- Build a churn-risk dashboard to flag at-risk members
- Predict event registration to adjust promotions or logistics early
- Use "what-if" modelling to test new benefit designs or pricing



6. Let AI Handle the Mundane, So You Can Deliver the Meaningful

The Problem: Teams are buried in admin tasks, limiting their time to build real relationships.

The Fix: Use agents and automation to cover routine tasks.

Quick Wins:

- Deploy agents to collect social media insights from key influencers
- Automate renewal reminders with personalized messaging
- Recommend benefits based on individual usage patterns



7. Connect the Dots Across the AI Stack

The Problem: Siloed tools = siloed insights. Disconnected platforms that disrupt the member experience.

The Fix: Integration enables a 360° view of your members, and more seamless AI workflows.

Quick Wins:

- Integrate CRM, email marketing, events, and website analytics
- Use tools to sync member data in real time
- Build an engagement dashboard that draws from all channels



8. Build a Future-Ready, Human-Centred Approach

The Problem: AI can feel intimidating or isolating to teams. And if misused, it can erode trust.

The Fix: Embed AI gradually, ethically, and transparently. Make it a co-pilot, not a replacement.

Quick Wins:

- Create clear AI use guidelines (transparency, explainability, etc.)
- Include staff in pilot programs and feedback loops
- Share small wins to build trust in AI adoption across teams

